



Conversion and Publications Research

September 2006





Publication Evaluation

- Database Analysis
 - Lead Profile and PRIZM_{NE}
- Focus Group Discussions
 - Travel Guide Content
 - Advertising
- Conversion
 - Visitation
 - Spending



DATABASE ANALYSIS



DATABASE ANALYSIS

- Evaluation of 109,825 individuals
- Geographic and demographic breakdowns



Lead Profile: State Breakdown

State	% Of Database
Indiana	40%
Illinois	11%
Ohio	7%
Michigan	6%
Kentucky	4%
California	3%
Wisconsin	3%
Missouri	2%
Texas	2%
Florida	2%



Lead Profile: DMA Breakdown

DMA	% Of Database
Indianapolis, IN	20%
Chicago, IL	10%
Ft. Wayne, IN	4%
South Bend-Elkhart, IN	4%
Cincinnati, OH	4%
Louisville, KY	3%
Terre Haute, IN	3%
Grand Rapids, MI	2%
Evansville, IN	2%
Detroit, MI	2%



Lead Profile: Demographics

Education		Marital Status	
Elem. School, H.S.	12.3%	Married Couples	38.0%
H.S. Graduate	19.2%	Families w/Kids	27.9%
Some College	23.8%	Singles/Couples	21.9%
College	20.7%	Mostly Singles	8.2%
College Grad+	15.6%	Mix, w/Kids	3.9%



Lead Profile: Demographics

Income

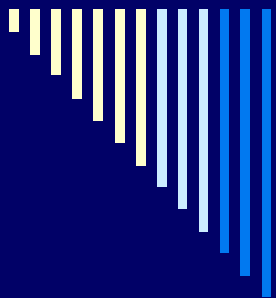
Less than \$30K	12.8%
\$30K to \$50K	34.8%
\$50K to \$75K	37.1%
\$75K to \$100K	12.0%
More than \$100K	3.3%

Age **46**

% w/children **28%**

Ethnic Heritage

White	53.8%
White, Asian	10.4%
White, Black, Hispanic	8.7%
White, Black	7.5%
All Races	2.8%
Black, Hispanic	2.7%
White, Asian, Hispanic	2.3%
White, Hispanic	1.6%
White, Black, Asian	1.1%
Black, Asian, Hispanic	0.6%



Trip Activities

Events & festivals	46%
Museums & historic sites	43%
Outdoor recreation	43%
Riverboat gaming	22%
Scenic drives	35%
Visit friends & family	26%



PRIZM_{NE} Analysis

- ❑ Creates profiles of households based on address
- ❑ 66 clusters classified into lifestyle and density-based groups
- ❑ Index identifies clusters that respond more strongly to Indiana materials

Index = (% in IOTD database/% of regional population)*100

For example the index for the Fast Track Families segment is:

$$(3.1\%/1.7\%)*100 = 178$$



PRIZM_{NE} Analysis

- 59% of highest ranking clusters are small towns and rural areas
- Lifestage breakdown of highest ranking clusters:
 - Families: 45%
 - Mature years: 34%
 - Younger years: 21%



Media habits

- TV: Sports-related programming, including auto racing, football and basketball
- Readership of sports and women's magazines, esp. *Southern Living*, *Good Housekeeping* and *Country Living*
- Newspaper readership of home, business and travel sections



Market Demographics

Income	All	Chicago	Cinci	Indy	L'ville
Less than \$30K	13%	6%	9%	10%	16%
\$30Kto \$50K	35%	29%	32%	36%	42%
\$50K to \$75K	37%	42%	42%	40%	34%
\$75K to \$100K	12%	16%	11%	12%	6%
More than \$100K	3%	6%	6%	3%	2%



Market Demographics

Marital Status	All	Chicago	Cinci	Indy	L'ville
Married Couples	38%	36%	38%	38%	37%
Families w/Kids	28%	27%	30%	29%	30%
Singles/Couples	22%	22%	20%	20%	21%
Mostly Singles	8%	9%	8%	9%	9%
Mix, w/Kids	4%	6%	5%	4%	5%



Market Demographics

Education	All	Chicago	Cinci	Indy	L'ville
Elem. School, H.S.	12%	7%	11%	12%	20%
H.S. Graduate	19%	10%	18%	21%	27%
Some College	24%	22%	24%	28%	24%
College	21%	33%	28%	23%	20%
College Grad+	16%	22%	19%	17%	9%



Market Demographics

Ethnic Heritage	All	Chicago	Cinci	Indy	L'ville
White	54%	42%	58%	60%	60%
White, Black, Hispanic	9%	9%	9%	11%	14%
White, Black	8%	5%	7%	8%	10%
White, Asian	10%	19%	13%	10%	5%
Black, Hispanic	3%	3%	3%	3%	4%
White, Hispanic	2%	1%	1%	2%	2%
White, Asian, Hispanic	2%	5%	3%	3%	2%
White, Black, Asian	1%	2%	1%	2%	1%
White, Black, Asian, His	3%	8%	3%	2%	1%
Black, Asian, Hispanic	1%	1%	1%	0%	1%



Chicago Market

- ❑ Most unique market in terms of PRIZM_{NE} clusters and demographics
- ❑ 90% of highest indexing clusters in suburban areas
- ❑ More equal split among families and mature years
- ❑ Better educated, earn higher incomes and are more ethnically diverse



Cincinnati Market

- Balance in population density – 54% from small towns; 42% from suburban areas
- Skews slightly more to families
- Less diverse than overall lead profile



Indianapolis Market

- Comprises 20% of entire database so demographics are similar to overall lead profile
- Only market with high indexing urban areas
- Slightly more families and less younger people than overall PRIZM_{NE} profile



Louisville Market

- All high performing PRIZM_{NE} clusters are from small towns and rural areas
- Least affluent and educated market



PRIZM_{NE} Clusters

- Highest Indexing:
 - Fast Track Families
 - New Homesteaders
 - White Picket Fences
 - Kid Country, USA

PRIZM_{NE} Clusters



□ Fast Track Families – Index 178

- Parents with upper-middle class incomes with numerous children and spacious homes
- Disposable income and educated sensibility to want the best for their children.
- They buy the latest technology: new computers, DVD players, home theater systems and video games.

PRIZM_{NE} Clusters



□ New Homesteaders – Index 174

- Young, middle-class families seeking to escape suburban sprawl
- With decent paying jobs in white-collar and service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles
- Driveways filled with campers and powerboats, their family rooms with PlayStations and Game Boys

PRIZM_{NE} Clusters



□ White Picket Fences – Index 163

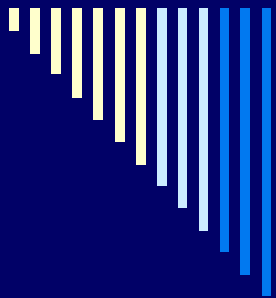
- Midpoint on the socioeconomic ladder
- Looks a lot like the stereotypical American household of a generation ago: young, middle-class, married with children
- Modest homes and ethnic diversity - including a disproportionate number of Hispanics and African-Americans

PRIZM_{NE} Clusters



□ Kid Country, USA – Index 155

- Dominated by large families living in small towns
- Predominantly white, with an above average concentration of Hispanics, these are young, working-class households
- About 20% of residents own mobile homes



FOCUS GROUPS



FOCUS GROUPS

- Chicago and Cincinnati – all users of guides
- Half of groups were requestors of Indiana materials
- Goals:
 - Learn About Trip Planning Process
 - Evaluation of Guide: Editorial Content, Cover, Design and Advertising



Travel Planning

□ Four-step process:

- Web used to choose a destination
- Publications employed for ideas about attractions, restaurants and events
- Bookings and mapping are done via the Internet
- Travel guides are brought on trips for convenience and last-minute additions



Travel Planning

- Not an “either/or” decision between printed guides and the Internet– both are integral to trip planning
- Guides are enjoyable part of process
- Print materials provide tangible connection:
 - Flip through at leisure
 - Share ideas with family members



Organization and Content

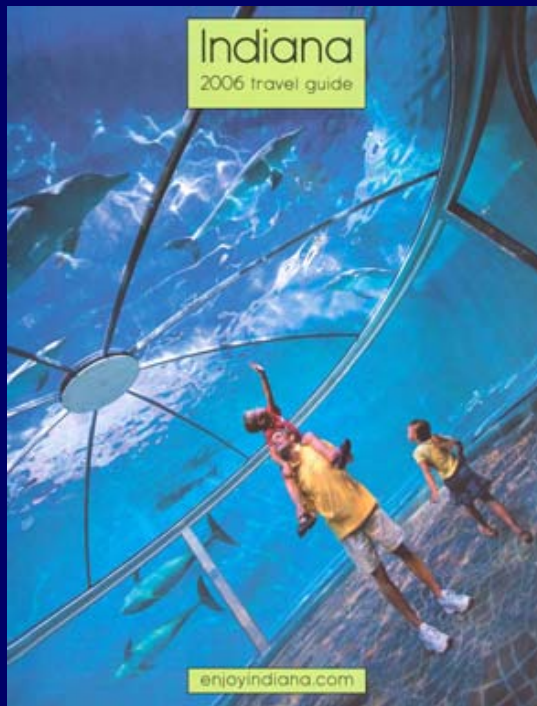
- Consumers like Guide's progression:
 - Statewide editorial
 - Regional editorial
 - Advertising
 - Listings and Grids
- Statewide editorial quantity and variety ensure consumers find something appealing



Organization & Content

- Consumers like balance between in-depth statewide editorial and regional “Must See” lists.
- Regional organization is appropriate for how consumers travel -- by geography, not activity.

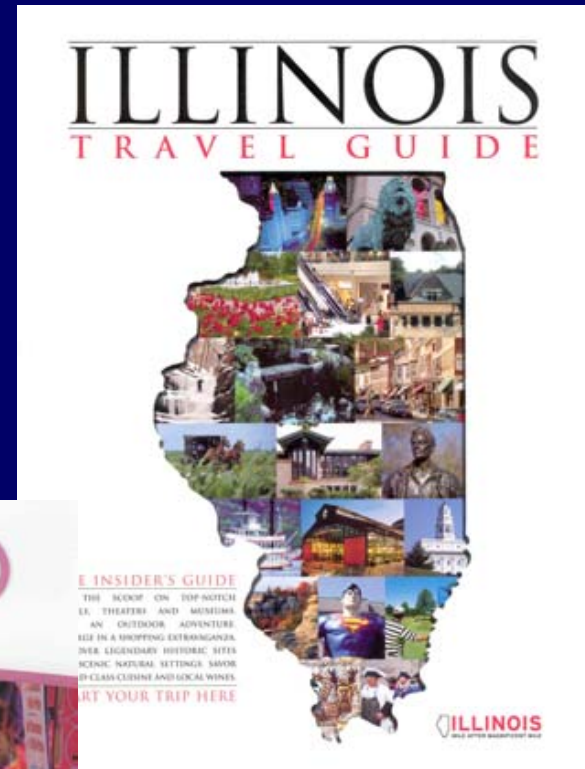
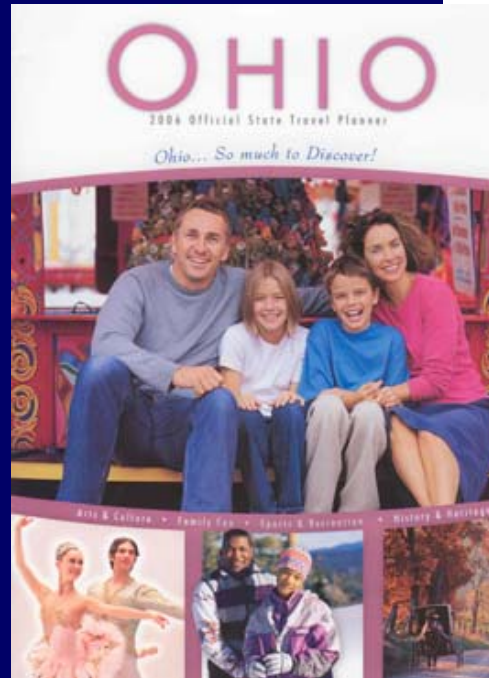
Cover



- ❑ Evaluated against numerous competitors:
 - California, Illinois, Iowa, Kentucky, Ohio, South Carolina and Virginia
 - Single photo vs. multiple images
 - People vs. scenic shot

Guide Covers

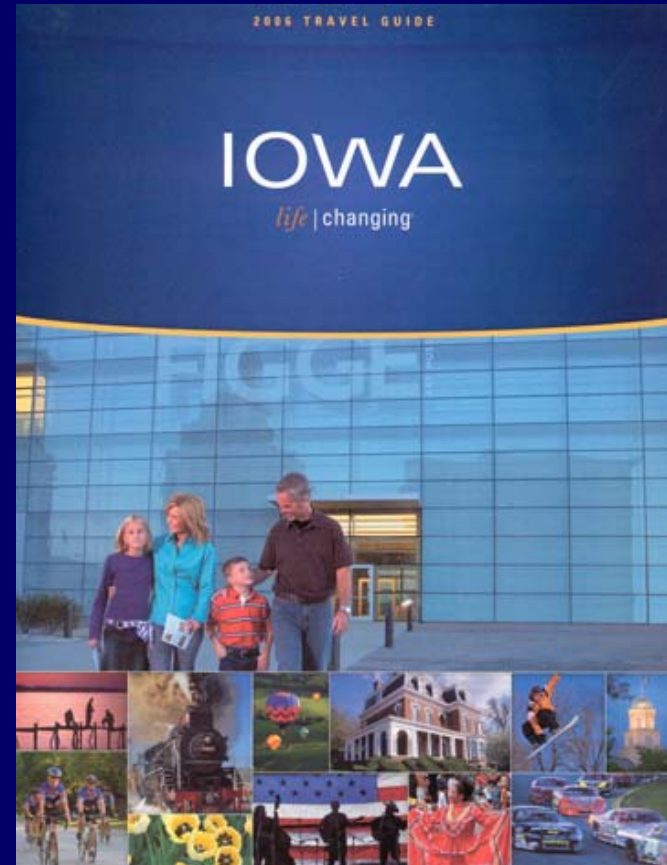
**Multiple photos are
confusing to
consumers and
detract from the
overall impact**



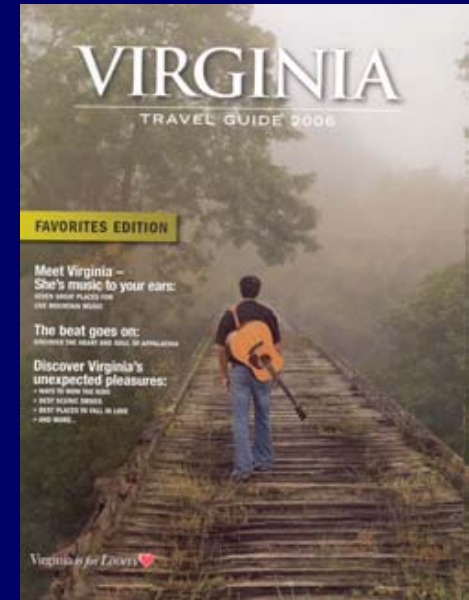
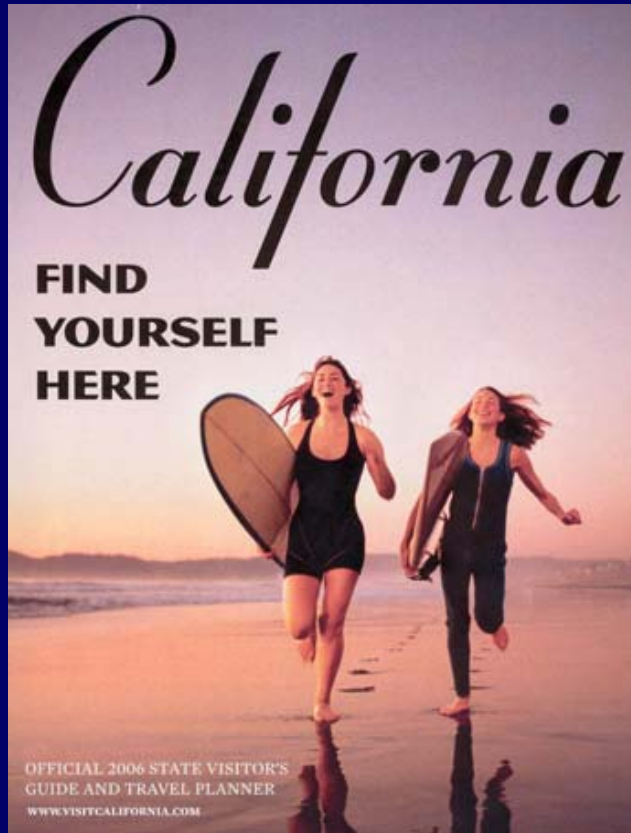
Guide Covers

Don't look too corporate.

A cover needs to embody the fun of travel



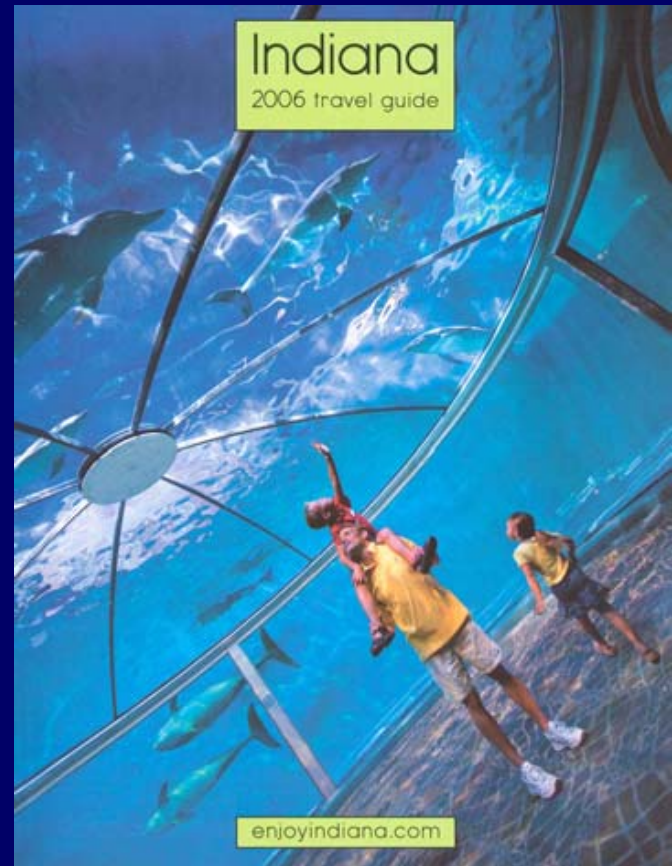
Guide Covers



Show product without too much focus on people. Only show people in the context of how they can enjoy a destination or attraction

Guide Covers

The most effective cover utilizes a single photo that tells potential visitors something they don't already know about the state





Photography & Maps

- Photography is the most important element to a satisfying trip planning experience
- Photos should be considered another way to give consumers trip ideas – captions essential
- Photography expected; maps appreciated



Advertising

- General opinion of advertising not always positive – “necessary evil”
- Guide’s current formatted ads viewed as informational – groups even referring to them as “articles”
- Formatted vs. camera ready

Advertising



Columbus: Architecture, Family Fun, and Parks

People from across the nation visit Columbus and experience architecture, the great outdoors, landscaping and gardens, and family fun. The city is ranked sixth in the U.S. for architecture innovation and design by the American Institute of Architects.

Columbus Area Visitors Center
506 5th St., Columbus, IN 47201
800-468-6564 • columbus.in.us

Request a brochure ad on page 146.

COLUMBUS
INDIANA

Enjoy
COLUMBUS
INDIANA

Gardens & Landscaping

18 city parks - 530 acres
Park system ranked #1 in the U.S.
Mill Race Park a top-100 U.S. property
1910 private garden, Italian design, one city block
Article, December 2005, Smithsonian Magazine

World-Class Landscape Architects:
Dan Kiley, Michael Van Valkenburgh

800-468-6564 www.columbus.in.us

Advertising



Dunes...Diverse...Different

our Lakefront Casinos • Live Entertainment • Quaint Hometowns • Miles of Beaches

Call (800) ALL-LAKE Log On www.lakecountycvb.com

County Indiana
Convention & Visitors Bureau



Experience the Lake Effect

Indiana's Chicago, Lake County, Indiana is located only 25 miles from downtown Chicago. You can stay in Lake County for half the price and still enjoy all of what the big city has to offer!



The Indiana Dunes National Lakeshore stretches along southern Lake Michigan about 50 miles southeast of Chicago, Illinois. The lakeshore begins in Lake County and continues through Northwest Indiana. Almost 25 miles of beaches, sand dunes, wetlands, bogs and woodland forests are preserved to make the Indiana Dunes National Lakeshore a must see attraction.

Shopping enthusiasts will find much to do and see in Lake County.

Lake County Indiana Convention & Visitors Bureau
800-ALL-LAKE • lakecountycvb.com

Request a brochure on page 145.



Indiana Beach
AMUSEMENT RESORT

On Lake Shaffer • 5224 E. Indiana Beach Rd. • Mondovi, Indiana 47960 • (574) 583-4141 • www.IndianaBeach.com

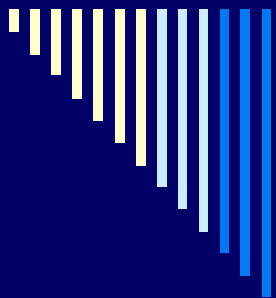
Rollercoaster • 3,000 Acres of Water Fun • Boat • 5 Giant Coasters • Giant Water Park • Entertainment • Restaurant

ALL THE FUN THINGS YOU LOVE TO DO!



Advertising

- ❑ Formatted ads are viewed as pieces of information and not as advertising
- ❑ Have more credibility with the consumer
- ❑ Because viewed as editorial, formatted ads are more likely to be read by the consumer



CONVERSION

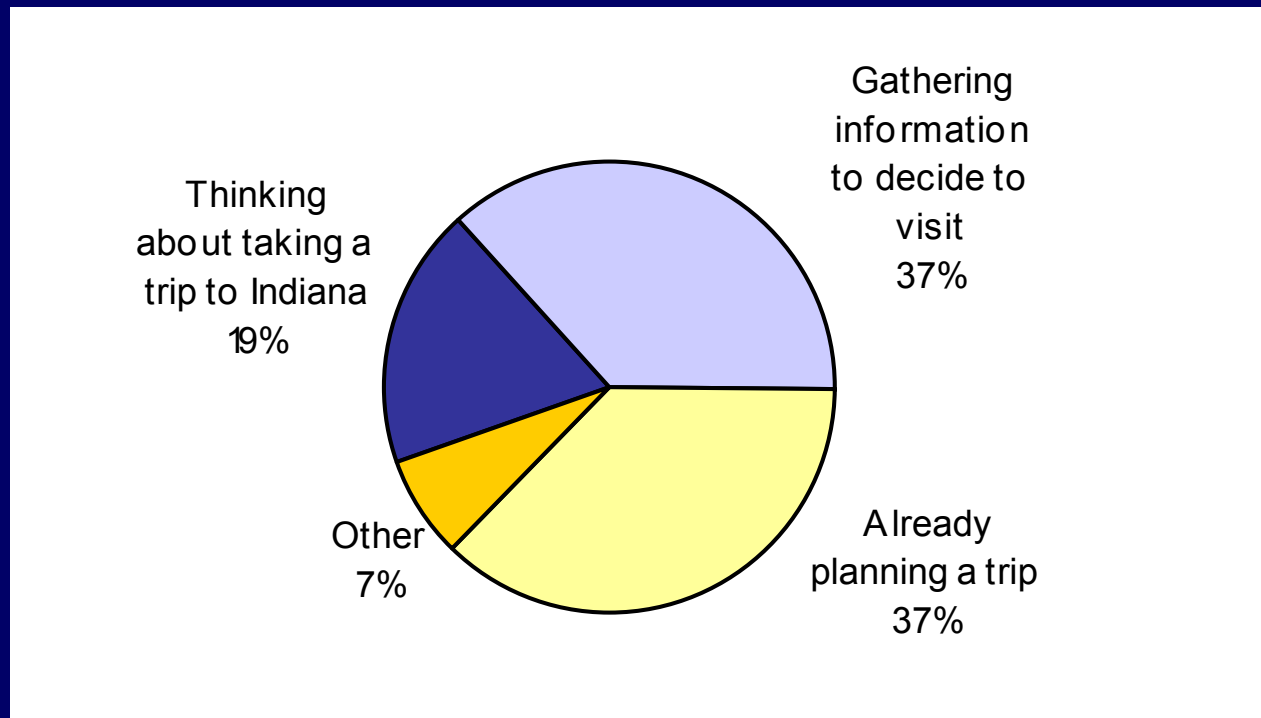


CONVERSION

- Requestors of Indiana materials from March through May were interviewed in August 2006
- Goal:
 - Assess Travel Planning Process
 - Measure level of visitation and expenditures
 - Explore trip specifics
 - Create visitor profile

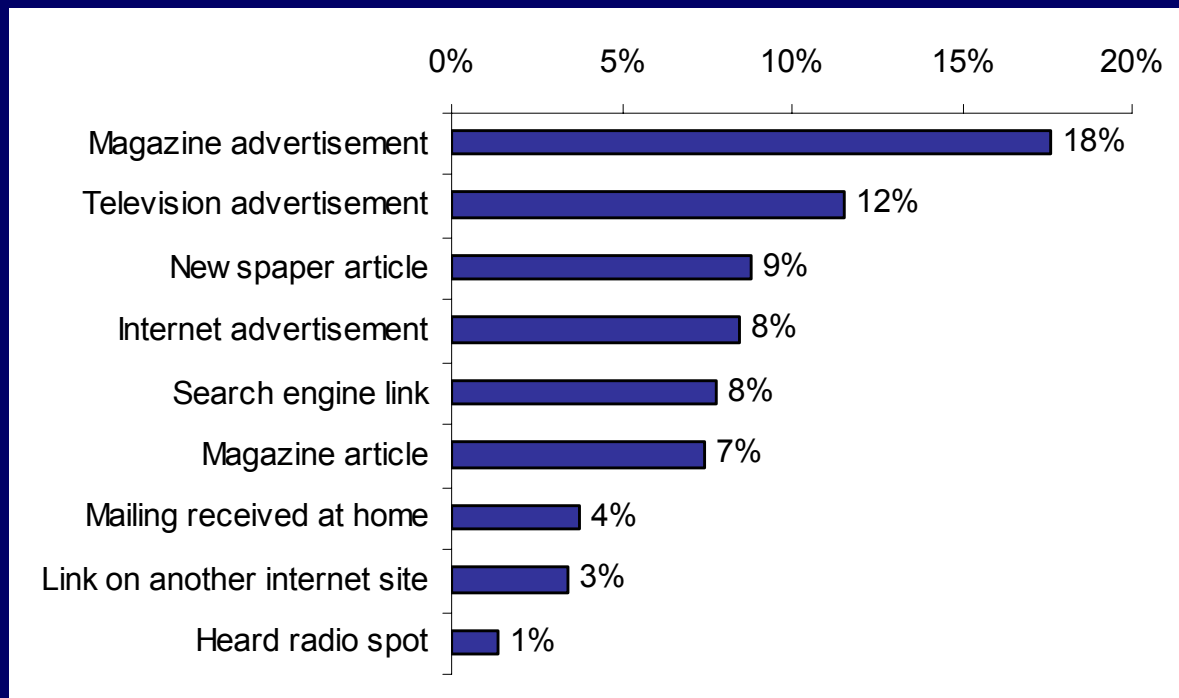
Travel Planning

Information Request Motivation



Travel Planning

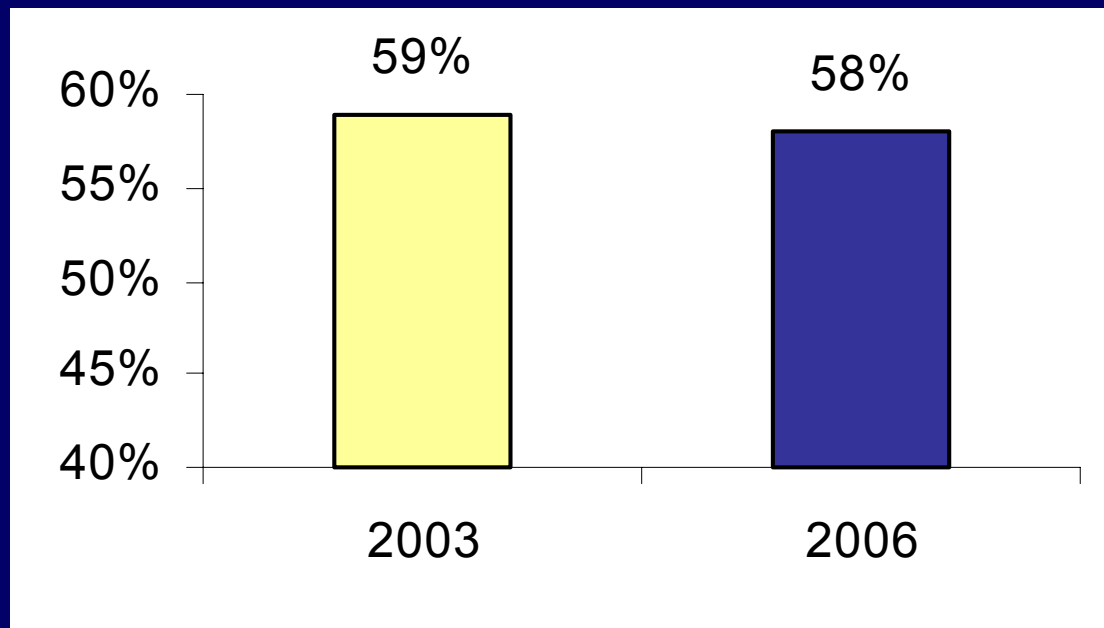
Advertising Recall



□ 52% of requestors recalled Indiana advertising or promotion

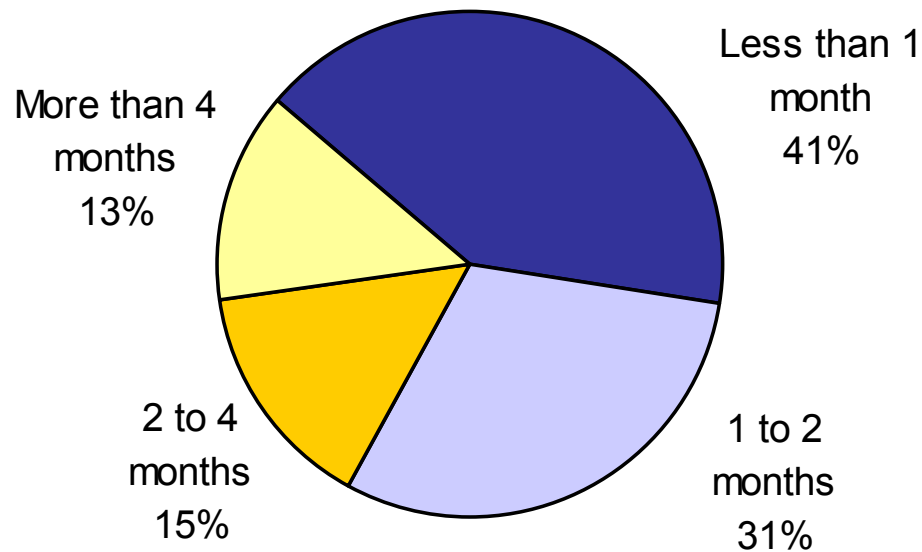
Conversion

Conversion Rate

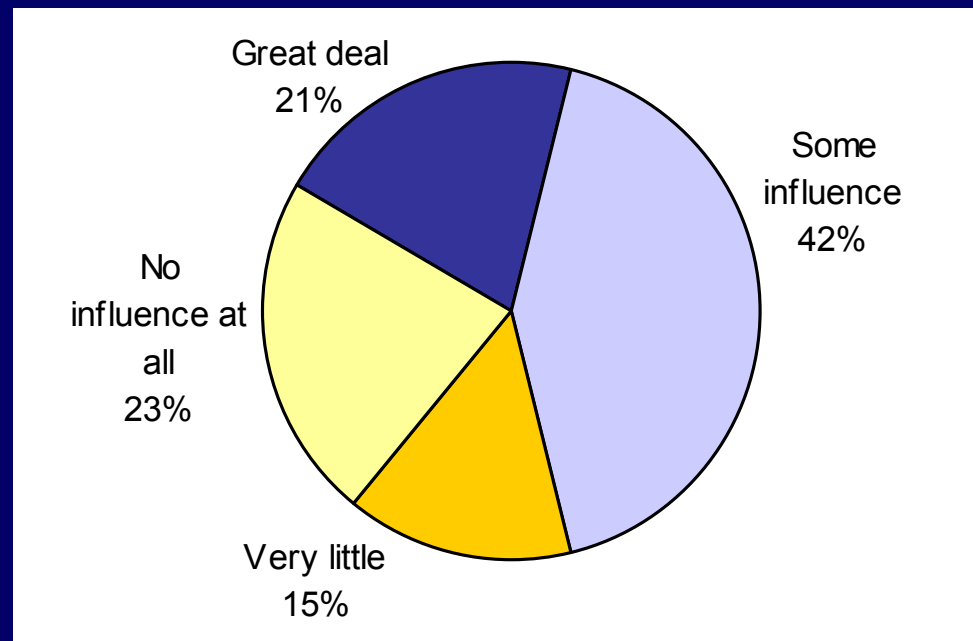


Travel Planning

Timing of travel after publications request



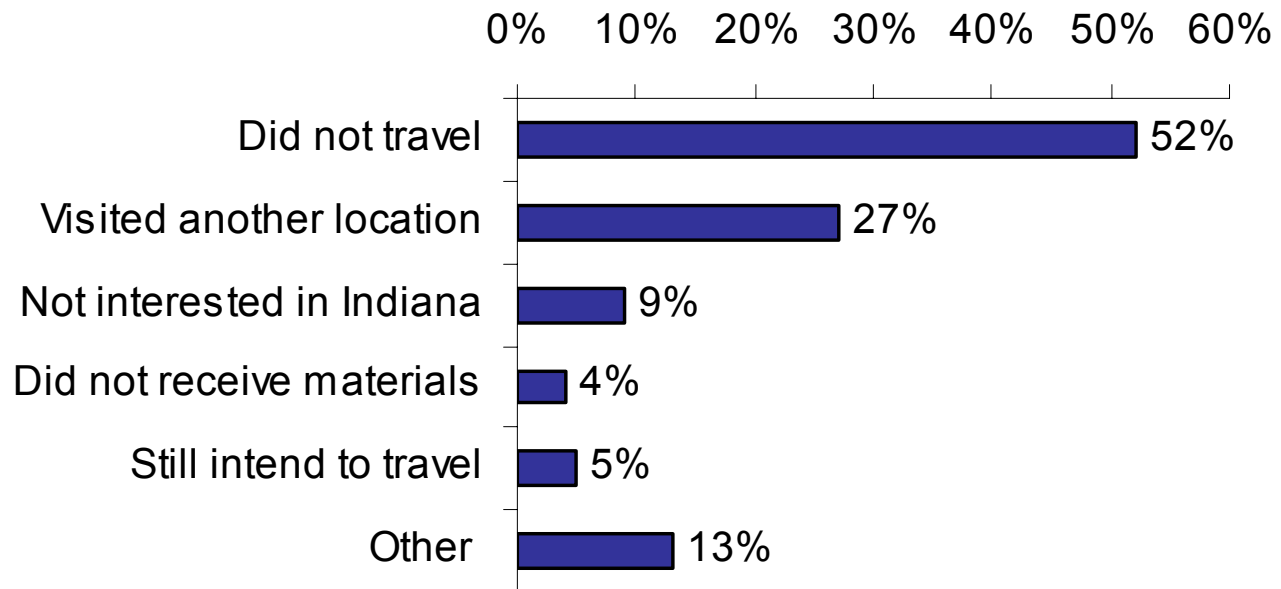
Travel Planning



- 63% of visitors report publications have a great deal or some influence on their decision to travel

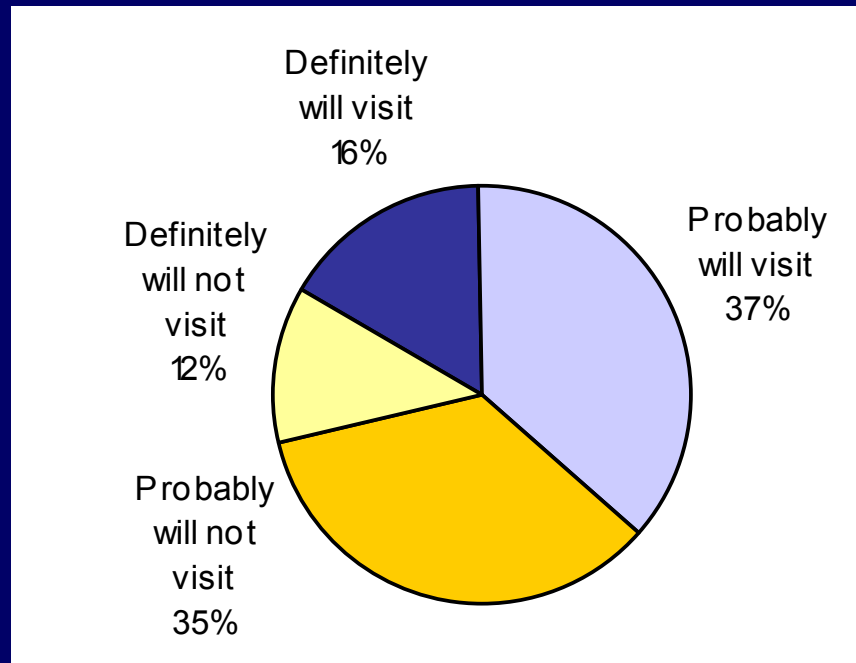
Non-visitors

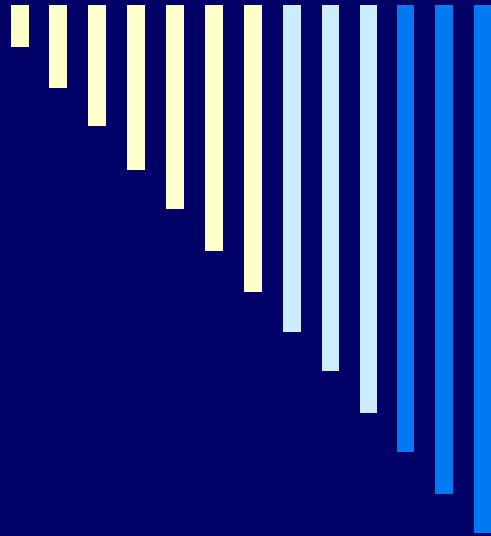
Reason for Non-visitation



Non-visitors

Future Travel Intentions

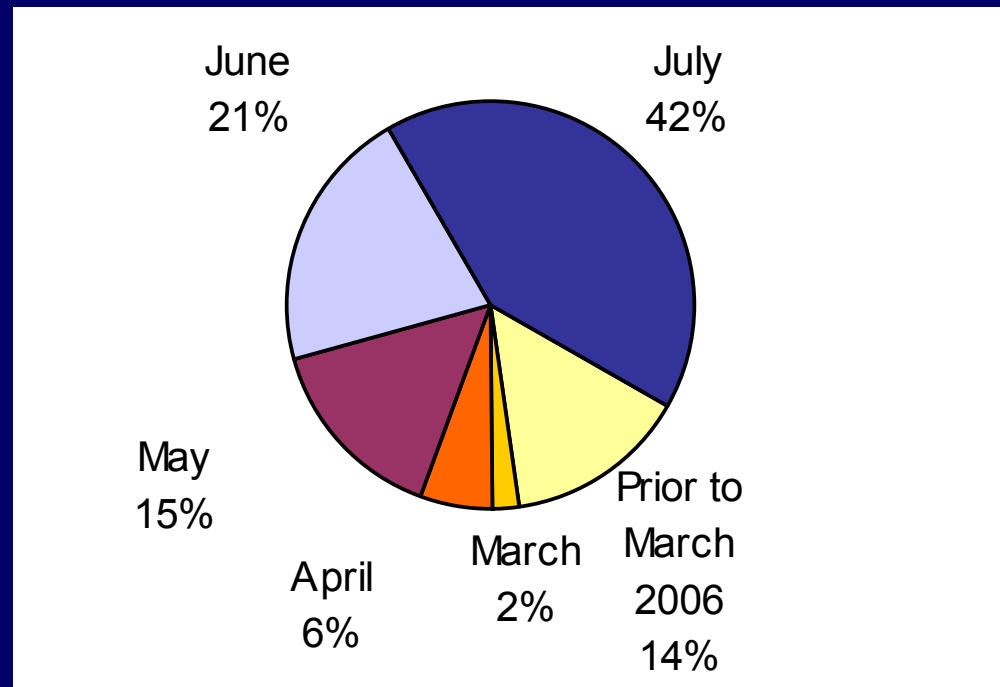




Trip Specifics

Trip Specifics

Month of Travel





Trip Specifics

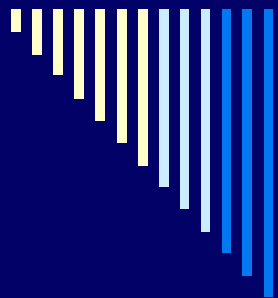
Nights	2.0
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% Daytrips	28%
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Adults on trip	2.4
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Children on trip	0.7
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% with Kids	29%
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Trip Specifics

Enjoy scenic beauty	54%
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Eat at restaurants unique to the area	48%
---------------------------------------	-----

Go shopping	41%
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Take scenic drives or driving tours	41%
-------------------------------------	-----

Visit small or quaint towns	40%
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Visit historic sites	35%
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Go to lakes or rivers	33%
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Visit with friends or relatives	29%
---------------------------------	-----

Attend fairs or festivals	26%
---------------------------	-----

Visit state or national parks	25%
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Visit zoos or museums	19%
-----------------------	-----

Go hiking or biking	19%
---------------------	-----

Go antique shopping	19%
---------------------	-----

Visit metropolitan cities	18%
---------------------------	-----

Look for distinctive architecture	17%
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Outdoor activities	16%
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Visit art or cultural museums	16%
-------------------------------	-----

Go camping	15%
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Gamble at a riverboat casino	12%
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Go to a music concert	10%
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Attend sporting events	10%
------------------------	-----

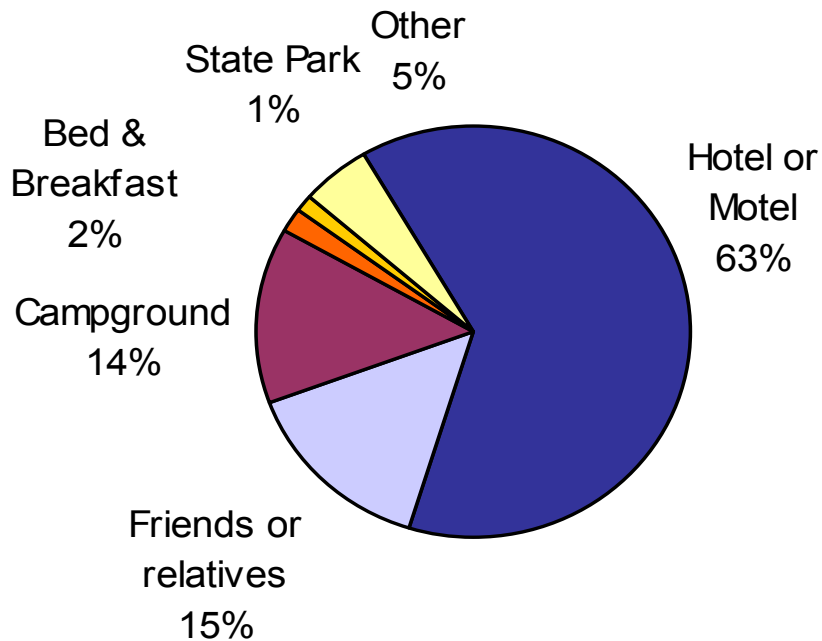
Visit amusement or theme parks	9%
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Attend musical performances	9%
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Visit nightclubs or bars	8%
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Trip Specifics

Type of Accommodation Used





Trip Specifics

Lodging	\$68
Meals/food/groceries	\$54
Admission/Costs at attractions	\$26
Entertainment	\$23
Shopping	\$57
Transportation	\$53
Misc.	\$18
Spending per day	\$299
X # of days	2
Trip Spending	\$599
Per person/per day	\$97



Influenced Trips

- Those who said publications had a great deal or somewhat of an influence on their decision-making participated in a wider variety of activities
- Those influenced by the Indiana Travel Guide stayed longer and therefore took fewer daytrips
- Influenced trips generate 38% more per day but 116% more total expenditures



Influenced Trips

Publications' Influence on Trip Specifics

	No Influence	Influenced
Nights	1.6	2.5
Daytrips	32%	20%
Adults	2.5	2.5
Children	0.4	0.8
% With kids	31%	28%

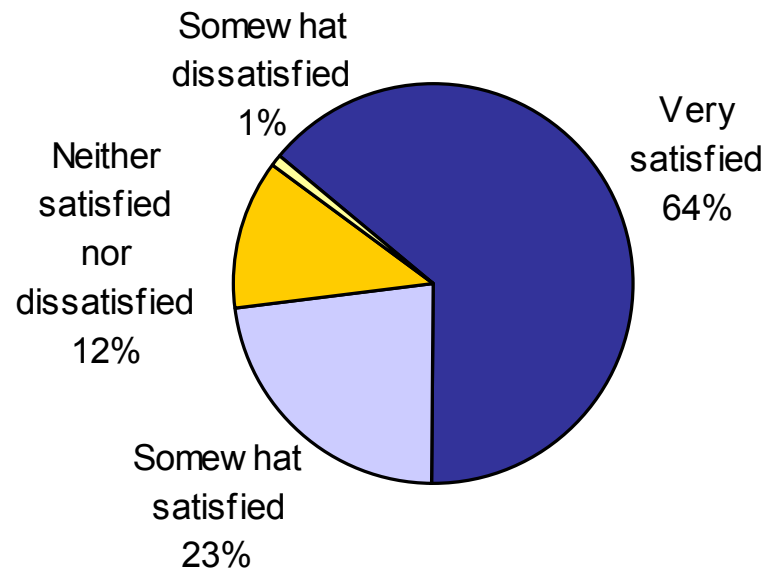


Influenced Trips

Expenditures for...	No Influence	Influenced
Lodging	\$53	\$81
Meals/food/groceries	\$43	\$63
Admission/Costs at attractions	\$15	\$37
Entertainment	\$36	\$19
Shopping	\$40	\$66
Transportation	\$45	\$52
Misc.	\$16	\$24
Per Day Spending	\$248	\$343
X # of Nights	1.6	2.5
Trip Spending	\$397	\$856

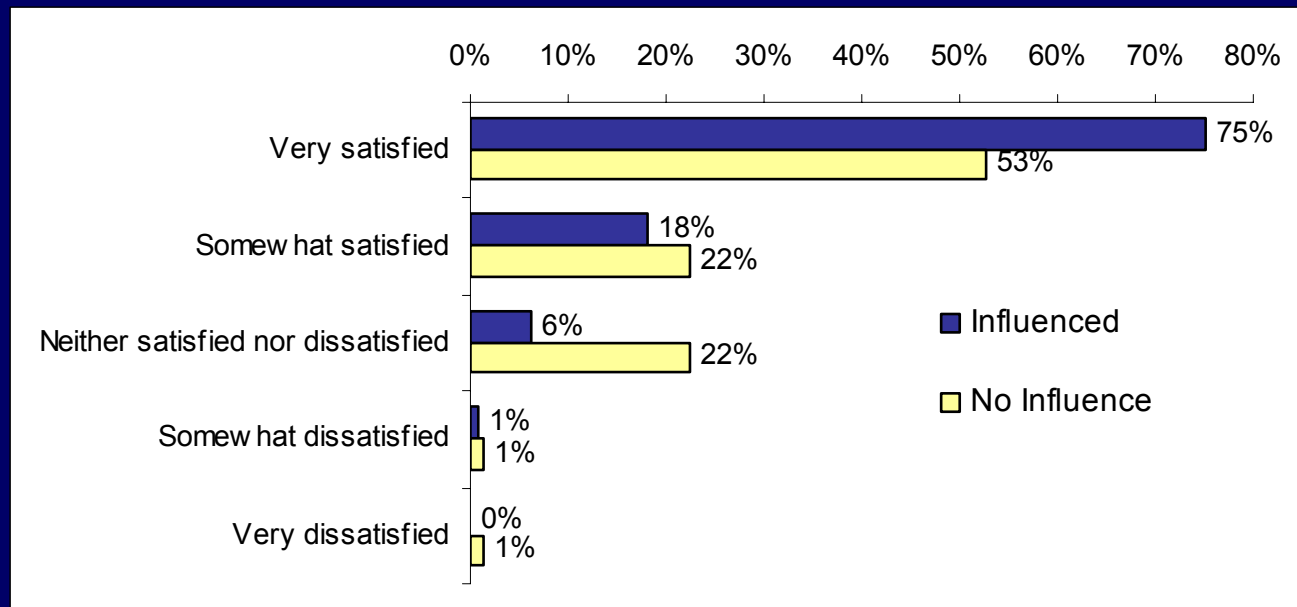
Future Travel Intentions

Visitor Satisfaction



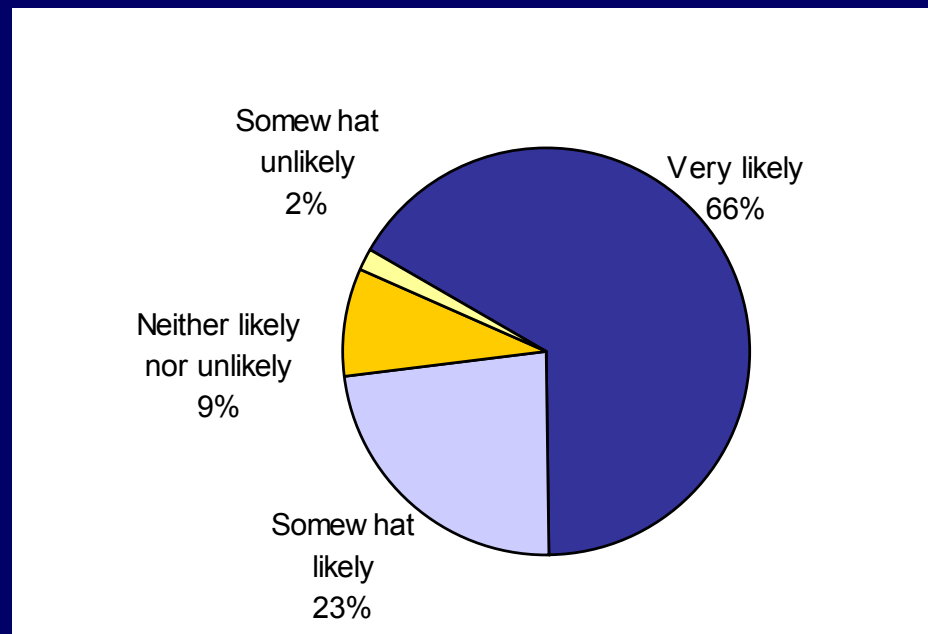
Future Travel Intentions

Publications' Influence on Satisfaction



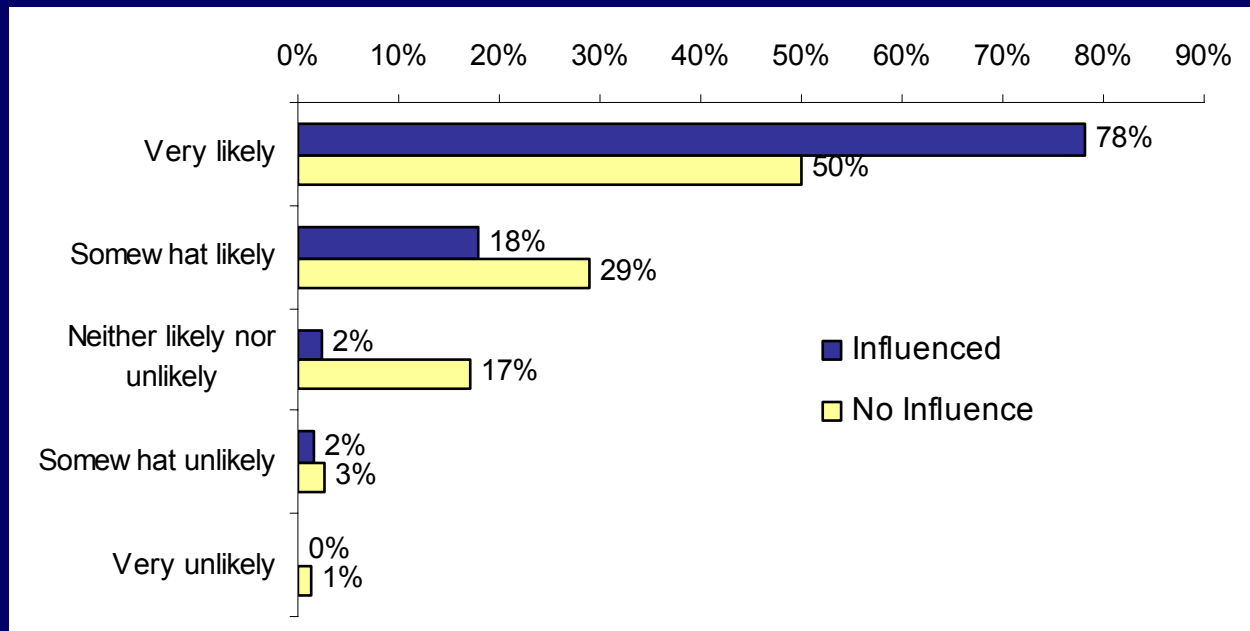
Future Travel Intentions

Visitors' Likelihood to Return



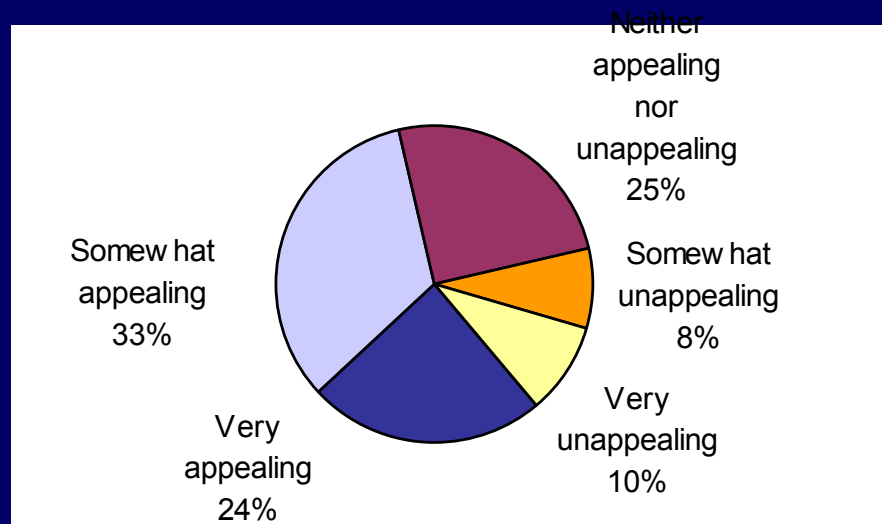
Future Travel Intentions

Publications' Influence on Likelihood to Visit



Play Pack

Appeal of Purchasing a Package

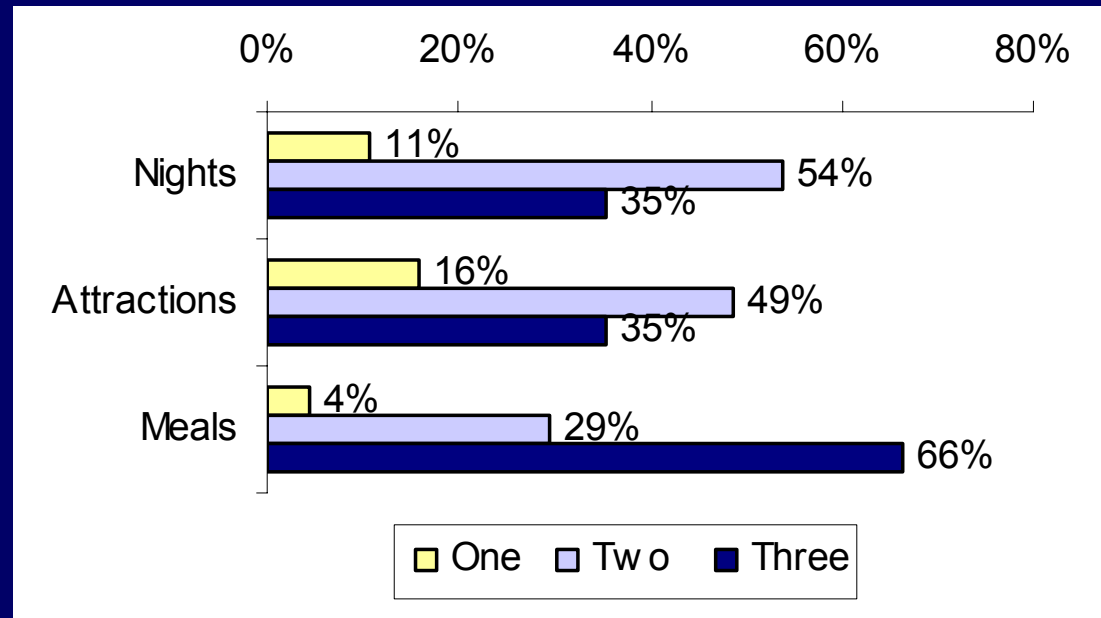


- Only 3% of Indiana requestors have ever purchased a package

Play Pack

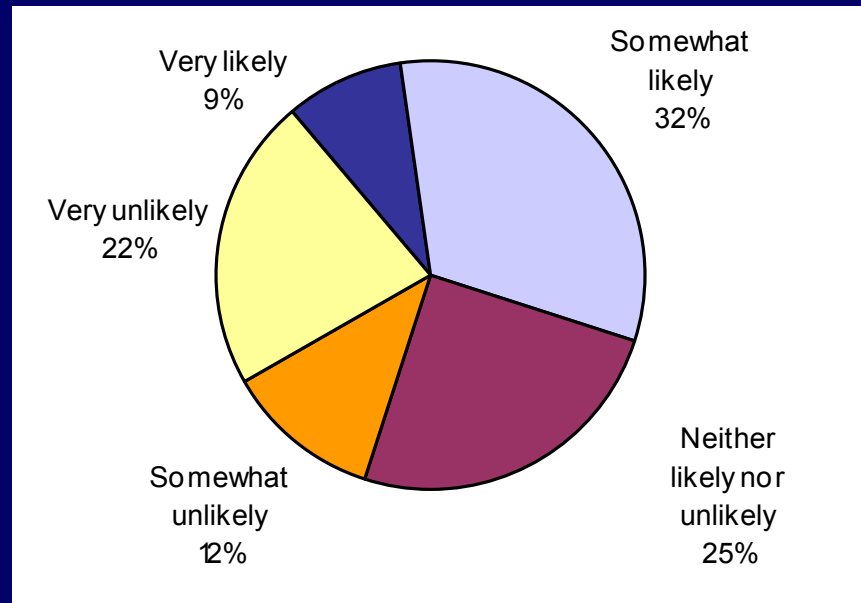
- 2 nights accommodation
- 2 attractions
- 3 meals

Package Content Preferences



Play Pack

Package Impact on Visitation



- Though package availability has little impact on travel, it is valuable because it provides consumers with trip ideas



Visitor Profile

- Visitor profile differs from lead profile:
 - Older
 - Better educated
 - Earn higher incomes
 - Geographic distribution



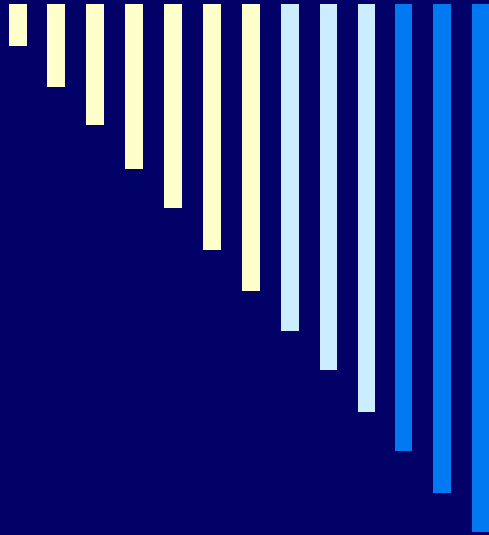
Visitor Profile

	Visitors	Requestors
Marital Status		
Married	73%	64%
Divorced	9%	8%
Single	18%	28%
% With Children	28%	29%
Education		
High school or less	21%	32%
Some college/tech school	28%	24%
College graduate	30%	21%
Post graduate degree	20%	16%
Average Income	\$66,066	\$59,992
Age	53	46



Visitor Profile

State	Visitor	Requestor
Indiana	38%	40%
Ohio	11%	7%
Illinois	10%	11%
Kentucky	6%	4%
Michigan	5%	6%
Wisconsin	4%	3%
Missouri	3%	2%
California	1%	3%
Texas	1%	2%
Florida	1%	2%



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